

Retention and Classification Report

Agency: Fillmore (Utah) (392)

75 West Center
Fillmore, UT 84631
435 743-5314

Records Officer Kevin Orton

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AGENCY: Fillmore (Utah)

SERIES: 12079

3

TITLE: Accounts payable

DATES:

ARRANGEMENT: Numerical by vendor number and name

DESCRIPTION:

These are records used to pay municipal bills. Files consist of copy of checks, invoices, purchase orders, and receiving reports. May also include correspondence with vendors and computer printouts (UCA 70A-2-725).

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 05/03/1993

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 4 years and then destroy.

APPRAISAL:

Administrative Fiscal Legal

PRIMARY CLASSIFICATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12078

3

TITLE: Accounts receivable

DATES:

ARRANGEMENT: Numerical by account number

DESCRIPTION:

These files consist of copies prepared by municipalities to collect amounts owed by vendors, organizations, and citizens having accounts with municipal agencies (UCA 70A-2-725).

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 05/03/1993

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 4 years and then destroy.

APPRAISAL:

Administrative Fiscal

PRIMARY CLASSIFICATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12050

3

TITLE: Beer license application files

DATES:

ARRANGEMENT: Numerical by account number

DESCRIPTION:

These files contain completed applications to obtain licenses for selling beer within municipal boundaries per local ordinances. Applicants are also required to file a cash or corporate bond "to guarantee faithful performance" (UCA 32-4-4).

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 04/30/1993

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 4 years after expiration and then destroy.

APPRAISAL:

Administrative Fiscal Legal

PRIMARY CLASSIFICATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12049

3

TITLE: Building permit files

DATES:

ARRANGEMENT: Numerical by application number

DESCRIPTION:

These files contain the permits issued as official building authorization for a variety of actions (construction, demolition, the installation of plumbing, electrical or mechanical equipment and the erection of barricades). They contain inspection requests, inspection reports, certificates of occupancy and any pertinent information relating to the project. They may also contain water source, sewer system, flood plain, and tank certificates. The files are arranged numerically by permit number or alphanumerically by address.

RETENTION:

Retain permanently.

DISPOSITION:

Retain in agency custody.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 04/01/2009

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office permanently.

AGENCY: Fillmore (Utah)

SERIES: 12049

TITLE: Building permit files

(continued)

APPRAISAL:

Administrative Fiscal Historical Legal

PRIMARY CLASSIFICATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12051

3

TITLE: Business license files

DATES:

ARRANGEMENT: Alphanumerical by name and account number

DESCRIPTION:

These files contain information on all business licenses issued in the municipality. All businesses are required to be licensed before conducting within municipal boundaries. They contain the application, proof of payment, and approval forms from regulatory departments (e.g., fire, police, health).

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 04/30/1993

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 4 years after final renewal and then destroy.

APPRAISAL:

Administrative Fiscal

PRIMARY CLASSIFICATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12083

3

TITLE: Cemetery records

DATES:

ARRANGEMENT: Alphabetical by last name

DESCRIPTION:

These are registers of names of all persons owning burial plots in the cemetery. They include deed number, date issued, name of owner, description of property, amount paid, receipt number, perpetual care record, date issued, and certificate number. This register is also called "Burial Right" Registers or Payment Records.

RETENTION:

Retain permanently.

DISPOSITION:

Retain in agency custody.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 09/11/2015

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office permanently.

APPRAISAL:

Administrative Fiscal Historical Legal

AGENCY: Fillmore (Utah)

SERIES: 12083

TITLE: Cemetery records

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12045

3

TITLE: Contracts and agreements files

DATES:

ARRANGEMENT: Alphabetical by name

DESCRIPTION:

These files contain official agreements enforceable by law, to acquire or incur services and products under \$ 2,000.00. File may also include utility agreements, cosignatory agreement, deferral agreement, payments agreements, ordinances, bonds, job specification books, and related correspondence.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 04/30/1993

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 10 years and then destroy.

APPRAISAL:

Administrative Legal

PRIMARY CLASSIFICATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12072

3

TITLE: Council minutes

DATES: 1852-

ARRANGEMENT: Chronological by meeting date.

DESCRIPTION:

These are the official record of the proceedings of regularly scheduled, special and emergency council meetings. Includes date, time, and place of meeting, name of members in attendance and those absent, a record of subjects discussed, statements of intent, and a record of action taken.

RETENTION:

Retain permanently.

DISPOSITION:

Retain in agency custody.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 05/03/1993

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office permanently or until administrative need ends and then transfer to State Archives with authority to weed.

Microfilm master: Retain in State Archives permanently with authority to weed.

M-Disk: Retain in State Archives permanently with authority to weed.

AGENCY: Fillmore (Utah)

SERIES: 12072

TITLE: Council minutes

(continued)

APPRAISAL:

Administrative Historical

This series has permanent historical value as documentation of function and actions of the city council.

PRIMARY CLASSIFICATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12393

3

TITLE: Death and burial registers

DATES: 1854-

ARRANGEMENT: Generally chronological by death or burial date.

DESCRIPTION:

The volumes in this series document deaths and burials for persons buried in the Fillmore City Cemetery. Ledger columns vary between volumes but may include the line number, name of the deceased, date of death, age, cause of death, place of birth, date of birth, gender, parents' names, physician or nurse, grave locations, race, color, last place of residency, term of residence, marital status, and occupation. The first volume also includes a survey map of the cemetery as well as a record of lot ownership which includes the name of the purchaser, the location of the grave, the date of the sale, and the payment amount. Ownership records are entered by date of sale.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule CNT 14, Item 43.

AUTHORIZED: 09/11/2015

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office permanently after being microfilmed or until administrative need ends and then transfer to State Archives with authority to weed.

Microfilm master: Retain in State Archives permanently.

Microfilm duplicate: Retain in State Archives permanently with authority to weed.

M-Disk: Retain in State Archives permanently with authority to weed.

AGENCY: Fillmore (Utah)

SERIES: 12393

TITLE: Death and burial registers

(continued)

APPRAISAL:

Historical

This disposition is based on the value these records have in documenting deaths and burials in Fillmore.

PRIMARY CLASSIFICATION:

Public

SECONDARY CLASSIFICATION(S):

Private.

More recent records may record the cause of death, taken from a private death certificate. This information should remain private for 50 years, in accordance with Utah Code 26-2-22.

AGENCY: Fillmore (Utah)

SERIES: 12046

3

TITLE: Dog license files

DATES: 1988-

ARRANGEMENT: Numerical by license number

DESCRIPTION:

These files document the payment of license fees. They include: owner's name, breed of dog, sex, color, expiration date of license; expiration date of rabies vaccine, name of dog, indication if dog was altered, license fee, and when paid.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 02/13/2015

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 5 years after expired and then destroy.

APPRAISAL:

Administrative Fiscal

PRIMARY CLASSIFICATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12847

3

TITLE: Enterprise funds billing registers

DATES:

ARRANGEMENT:

DESCRIPTION:

This register consists of an itemized list of customer accounts. It is used for reference purposes. They include name of customer, service address, meter reading, water usage, water and sewer changes, payments, adjustments, prior balance due, and current balance due.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10/20/1993

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 3 years and then destroy.

APPRAISAL:

PRIMARY CLASSIFICATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12081

3

TITLE: Financial statements

DATES: 1903-

ARRANGEMENT: Chronological

DESCRIPTION:

One copy is sent to taxpayer and a duplicate is retained by treasurer to validate when paid. It is used as a record of payments on the assessment and for audit purposes. It includes name and address, treasurer's receipt number, block and lot numbers.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule MUN 12, Item 6.

AUTHORIZED: 05/03/1993

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 3 years after final payment is made and then destroy.

Microfilm master: Retain in State Archives permanently with authority to weed.

Microfilm duplicate: Retain in Office for 3 years after final payment made and then destroy.

APPRAISAL:

Administrative Fiscal
This disposition is based on

AGENCY: Fillmore (Utah)

SERIES: 12081

TITLE: Financial statements

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12082

3

TITLE: General ledgers

DATES:

ARRANGEMENT: Numerical by ledger number

DESCRIPTION:

These are a summary of receipts and disbursements by account and fund. May also include documentation from subsidiary ledgers to general ledger and accounting adjustments in the form of general entries.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 05/03/1993

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 10 years and then destroy.

APPRAISAL:

Administrative Fiscal Legal

PRIMARY CLASSIFICATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12048

3

TITLE: Mechanical system installation permit files

DATES: 1992-

ARRANGEMENT: Numerical by application number

DESCRIPTION:

These records are kept to verify that state mechanical code requirements are met, and all installations are inspected and recorded. This file includes application number, name of applicant, address and phone number of applicant, job site, type or purpose of installation, contractor, approved by and date, inspection report, permit number assigned, date and signature of city recorder.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule MUN 16, Item 2.

AUTHORIZED: //

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office permanently.

APPRAISAL:

Administrative Legal

This disposition is based on agencies need.

PRIMARY CLASSIFICATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12073

3

TITLE: Ordinances

DATES: 1852-

ARRANGEMENT: Generally chronological by date of adoption.

DESCRIPTION:

These books contain the legislative action of city council to regulate, require, prohibit, govern, control, or supervise any activity, business, conduct, or condition authorized by UCA 10-3-701 to 714. An ordinance includes the title, preamble, an ordaining clause, subject of ordinance, when applicable, penalty of violation, effective date, signature of mayor or acting mayor, and municipal seal.

RETENTION:

Retain permanently.

DISPOSITION:

Retain in agency custody.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 05/03/1993

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office permanently.

Microfilm master: Retain in State Archives permanently with authority to weed.

M-Disk: Retain in State Archives permanently with authority to weed.

AGENCY: Fillmore (Utah)

SERIES: 12073

TITLE: Ordinances

(continued)

APPRAISAL:

Administrative Fiscal Legal

Ordinances have legal value because they are municipal laws. They have historical value because ongoing ordinances document changes to the law over time.

PRIMARY CLASSIFICATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12077

3

TITLE: Personnel files

DATES:

ARRANGEMENT: Alphabetical by last name

DESCRIPTION:

These files are the official files for all municipal employees and usually include the original job application, correspondence, credential files, letters of commendation, pay and leave history, work performance, training certificates, and evaluation forms.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 05/03/1993

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 65 years after date of employment or until 3 years after retirement or death and then destroy.

APPRAISAL:

Administrative Fiscal

The history of a person's employment must be retained beyond the time he or she could potentially claim retirement benefits based on employment.

PRIMARY CLASSIFICATION:

Private UCA 63G-2-302

SECONDARY CLASSIFICATION(S):

Public. UCA 63G-2-301

AGENCY: Fillmore (Utah)

SERIES: 12076

3

TITLE: Policies and procedures

DATES:

ARRANGEMENT: Chronological

DESCRIPTION:

These are manuals which indicate the responsibilities and guidelines on administrative policies, operational procedures, and rules and regulations.

RETENTION:

Retain permanently.

DISPOSITION:

Retain in agency custody.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 03/11/2015

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office permanently.

APPRAISAL:

Administrative

PRIMARY CLASSIFICATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12084

3

TITLE: Redevelopment board minutes

DATES:

ARRANGEMENT: Chronological

DESCRIPTION:

These are the official record of the proceedings of regularly scheduled, special and emergency board meetings. Includes date, time, and place of meeting, name of members in attendance and those absent, a record of subjects discussed, statements of intent, and a record of action taken.

RETENTION:

Retain permanently.

DISPOSITION:

Retain in agency custody.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 05/03/1993

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office permanently.

APPRAISAL:

Administrative Historical Legal

AGENCY: Fillmore (Utah)

SERIES: 12084

TITLE: Redevelopment board minutes

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12075

3

TITLE: Resolutions

DATES:

ARRANGEMENT: Chronological by number

DESCRIPTION:

These are formal statements of a decision, or expression of opinion put before or adopted by the city council. They may perform the same function as an ordinance. Resolutions may include the following: establishing water and sewer rates, charges for garbage collection and fees charged for municipal services, establishing policies and guidelines, and regulating the use and operation of municipal property (UCA 10-3-717).

RETENTION:

Retain permanently.

DISPOSITION:

Retain in agency custody.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 05/03/1993

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office permanently.

APPRAISAL:

Administrative Fiscal Legal

Resolutions are similar to ordinances. Resolutions have legal value because they are municipal laws. They have historical value because ongoing resolutions document changes to the law over time.

AGENCY: Fillmore (Utah)

SERIES: 12075

TITLE: Resolutions

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12047

3

TITLE: Sign permit files

DATES: 1988-

ARRANGEMENT: Numerical by application number

DESCRIPTION:

These file is used to regulate signs within the city limits. This file includes date received, date approved by city, date issued, payment receipt number, date of payment, permit number, applicant name, applicant address, applicant phone number, job site address, type of sign, sign dimension, type of construction, architect/engineer/contractor name and phone number, business address, city license number, state license number, applicant signature and date, approval by and date, building inspector comments and signature, and city council approval and date.

RETENTION:

Retain 4 years after expiration.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule MUN 6, Item 2.

AUTHORIZED: 12/08/2003

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 4 years after expiration and then destroy.

AGENCY: Fillmore (Utah)

SERIES: 12047

TITLE: Sign permit files

(continued)

APPRAISAL:

Administrative Historical

This disposition is based on the agencies need.

PRIMARY CLASSIFICATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12080

3

TITLE: Tentative budget records

DATES:

ARRANGEMENT: Chronological

DESCRIPTION:

On forms prepared by the state auditor, the budget officer prepares a tentative budget and files it with the governing body for the ensuing year for each fund for which a budget is required on or before the first regularly scheduled meeting in May (UCA 10-6-111).

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 05/03/1993

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 5 years and then destroy.

APPRAISAL:

Administrative Fiscal Legal

PRIMARY CLASSIFICATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12054

3

TITLE: Utility accounts receivable

DATES: undated

ARRANGEMENT: Numerical by account number

DESCRIPTION:

These files consist of copies prepared by municipalities to collect amounts owed by vendors, organizations, and citizens having accounts with municipal agencies (UCA 70A-2-725).

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 05/03/1993

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 4 years and then destroy.

APPRAISAL:

Administrative

PRIMARY CLASSIFICATION:

Public